

CHECKLIST FOR JOINT TASK FORCE (JTF) J-5

- ☐ Have replacement units been identified or shortfalls forwarded to the JTF establishing authority for resolution?
- ☐ Has the JTF supported combatant commander's tasking and guidance been analyzed?
- ☐ Has guidance been developed for components?
- ☐ Have operation order (OPORD) or operation plan (OPLAN) shortfalls and limitations been identified and resolved?
- ☐ Have all support annexes been incorporated in the OPORD or OPLAN?
- ☐ Is the OPORD or OPLAN complete and in the proper format?
- ☐ Has the composition of the JPG been determined?
- ☐ Has the battle rhythm of the JPG been established?
- ☐ Does the Joint Operation Planning and Execution System data base accurately reflect all force and sustainment requirements needed to accomplish the assigned mission? Are these requirements properly routed, phased, prioritized, and sourced?
- ☐ Do current conditions indicate the need for replanning actions?
- ☐ Do current conditions indicate the need and suitability for planning for operations during prehostilities, such as special forces, psychological operations, and civil affairs?
- ☐ Does the situation call for redeployment planning?

SECTION B. JOINT TASK FORCE PLANNING

"The greatest lesson of this war [World War II] has been the extent to which air, land, and sea operations can and must be coordinated by joint planning...."

**Gen H. H. Arnold, USAF
Chief of Staff, USAF**

planning requires the full integration and synchronization of the JTF staff.

a. The requirement for a JTF may be identified in either the deliberate planning process or the CAP process.

- Deliberate planning is conducted principally in peacetime to develop joint OPLANs for contingencies identified in strategic planning documents.
- CAP is based on current events and conducted in time-sensitive situations and emergencies using assigned, attached, and allocated forces and

5. General

The CJTF will make the decision on how planning will be accomplished for the JTF. Regardless of how it is accomplished,

resources. Crisis action planners base their plan on the actual circumstances that exists at the time planning occurs.

- This section focuses on CAP.

b. Optimally, a **JTF should be established before or during CAP Phase III (course of action development) to allow the designated CJTF and staff to participate in as much of the CAP process as possible.**

Figure IX-3 highlights a comparison between the combatant command and JTF during the CAP process.

- A JTF performs joint planning functions similar to those of combatant commands for a specified mission or designated JOA.

- In “close-hold” planning scenarios, CJTF and key JTF staff members should be included in the planning process at the earliest opportunity.

c. **CAP begins when a significant incident or event is reported to an appropriate government agency and ends when the crisis is resolved or forces are withdrawn.**

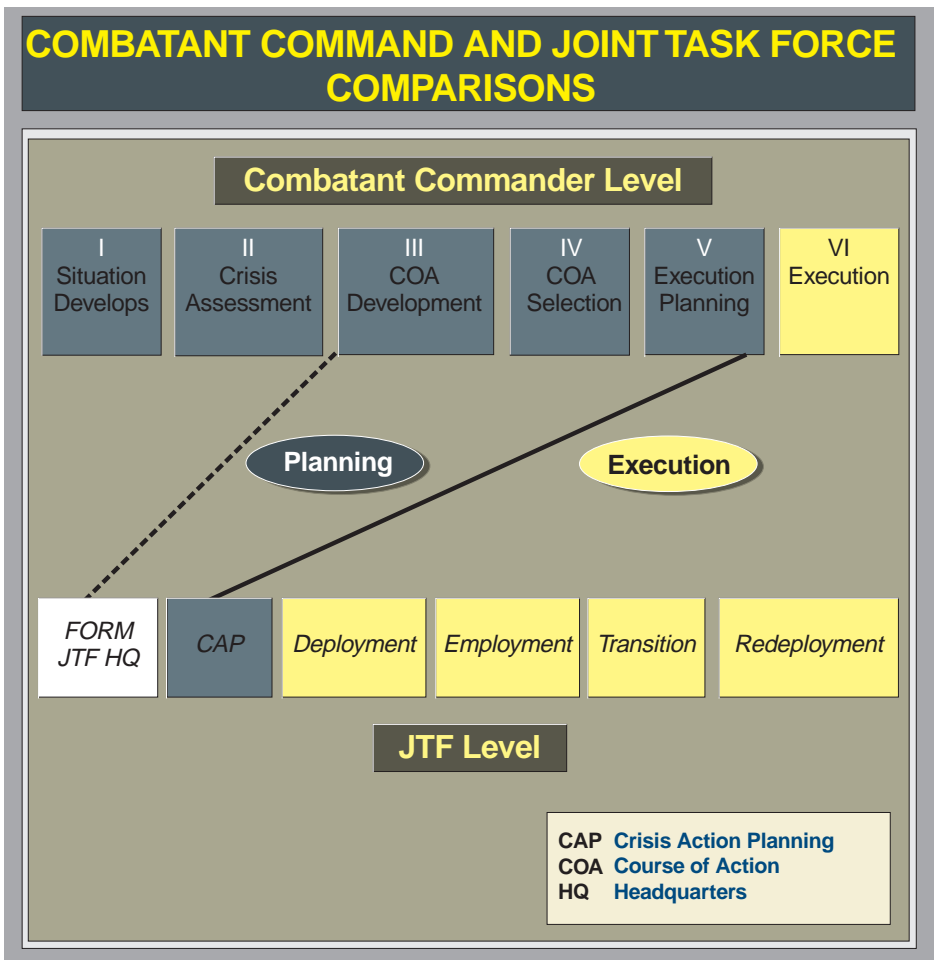


Figure IX-3. Combatant Command and Joint Task Force Comparisons

d. Once CAP is activated, effective interaction is essential to optimize information flow and coordinate planning activities among the NCA, Joint Staff, Services, Defense agencies, combatant commands, CJTF, designated forces, and other members of the Joint Planning and Execution Community (JPEC).

- The CJTF staff must maintain a close relationship with the supported combatant commander’s staff during CAP Phases III-VI to ensure that planning activities are coordinated.
- It is important that the CJTF keeps the JTF components informed of planning initiatives — **the CJTF should strive**

to have JTF components assigned for planning as early as feasible.

For further details, see JP 5-0, “Doctrine for Planning Joint Operations.”

6. Joint Planning Group

- a. **To enhance the CAP process, it is recommended that the CJTF form a planning element.** Figure IX-4 depicts a typical JPG.
- This element has been referred to by various commands as an operations planning group, operations planning team, crisis action team, or JPG. For simplicity, the term JPG will be used

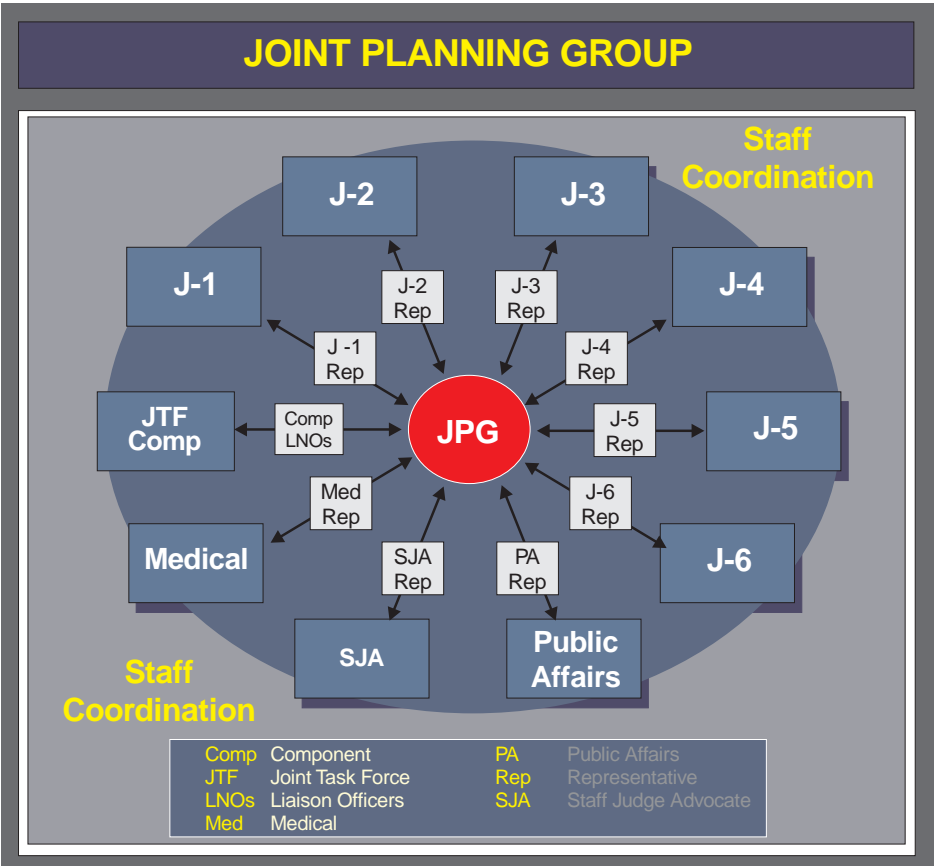


Figure IX-4. Joint Planning Group

throughout this publication when referring to this planning element.

- The decision on the organization and functions of the JPG should be determined by the CJTF at the onset of JTF organization.
- Furthermore, it must be made clear how the JPG and staff sections (especially the J-3 and J-5) will interact during planning and once operations commence.

b. Suggested purposes for the JPG are to conduct CAP, be the focal point for OPORD development, perform future planning, and accomplish other tasks as directed.

c. Composition of the JPG may vary depending on the planning activities being conducted. There are no “hard and fast” rules on how to determine the precise number of personnel required to staff the JPG. A task specific organization may work best. Figure IX-5 depicts one approach to JPG organization.

- Representation to the JPG should be a long-term assignment to provide continuity of focus and consistency of procedure.
- These representatives should be authorized spokespersons for their sections, components, or organizations.
- Often, representatives from the supported combatant command will augment the JPG.
- The heart of the JPG is the planning cell. This cell is a core of 10-12 personnel who are familiar with the CAP process and JOPES products. A small group of core planners is recommended, since large groups tend to become less focused and unmanageable. A focused effort is critical during the initial phases of CAP.

An organization such as USACOM's and USPACOM's DJTFAC and USEUCOM's core JTF cell may provide the planning expertise and continuity from the commander in chief's planning team to jump start the JTF planning process. These organizations typically include two separate groups: an operational planning team (OPT) to assist in joint planning, and a joint training team (JTT) to assist and act as a focal point for training the JTF staff. Figure IX-6 depicts this makeup.

- Figure IX-7 depicts the relationship of the DJTFAC subgroups (OPT and JTT) to the overall JTF staff.
- The JPG should be expanded for some planning functions. Typically these representatives will be called for when specific subject matter expertise and staff or component planning input is required. These members of the JPG should only be called for under specific circumstances. Many of these representatives are liaison officers (LNOs) and JTF staff action officers with specific duties and responsibilities to the CJTF.
- Additional cells may be formed in order to support the JPG effort. The information management cell manages the flow of information to and from the JPG. The deployment cell is organized to concurrently develop the TPFDL in JOPES. The cell is typically active only through the planning and deployment phases of an operation. A similar cell may be organized for redeployment. A joint IO cell may be organized to integrate and synchronize IO activities. An orders cell may be incorporated to support the administrative effort of publishing CJTF orders (warning order, planning order, OPORD, commander's estimate, and other related orders.)



DEPLOYABLE JOINT TASK FORCE AUGMENTATION CELL COMPOSITION

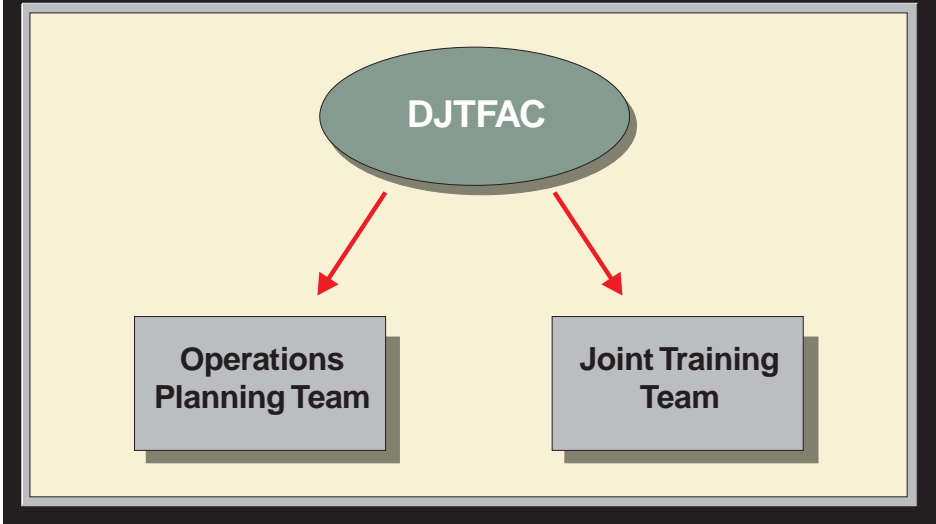


Figure IX-6. Deployable Joint Task Force Augmentation Cell Composition

- Figure IX-8 depicts one example of JPG linkages as well as additional members of the JPG.
- d. The composition of the JPG is a carefully balanced consideration between group management and appropriate representation from the JTF staff and components. JPG membership will vary based on the tasks to be accomplished, time available to accomplish the tasks, and the experience level of the JPG members.
- In the initial planning phase, the JPG is focused on mission analysis. This lends itself to a small group (10-12 personnel) of core planners, or the planning cell. Once mission analysis has been completed, the entire JPG may be assembled to brief the results of the mission analysis and to disseminate the commander's planning guidance.
- Appropriate representation from the JPG will then proceed to COA development and analysis. The JPG may be organized into COA teams that are responsible for developing, refining, and wargaming each COA.
- Once the JTF has completed initial planning and an OPORD or OPLAN has been published, the focus of the JPG turns to branch and sequel planning. Normally, this type of planning will be conducted by the planning cell. The entire JPG is assembled under specific circumstances. This is in consideration of the duties and responsibilities of LNOs and other representatives during the execution phase. The JPG can expend a significant amount of planning time in attempting to assemble ad hoc meetings.

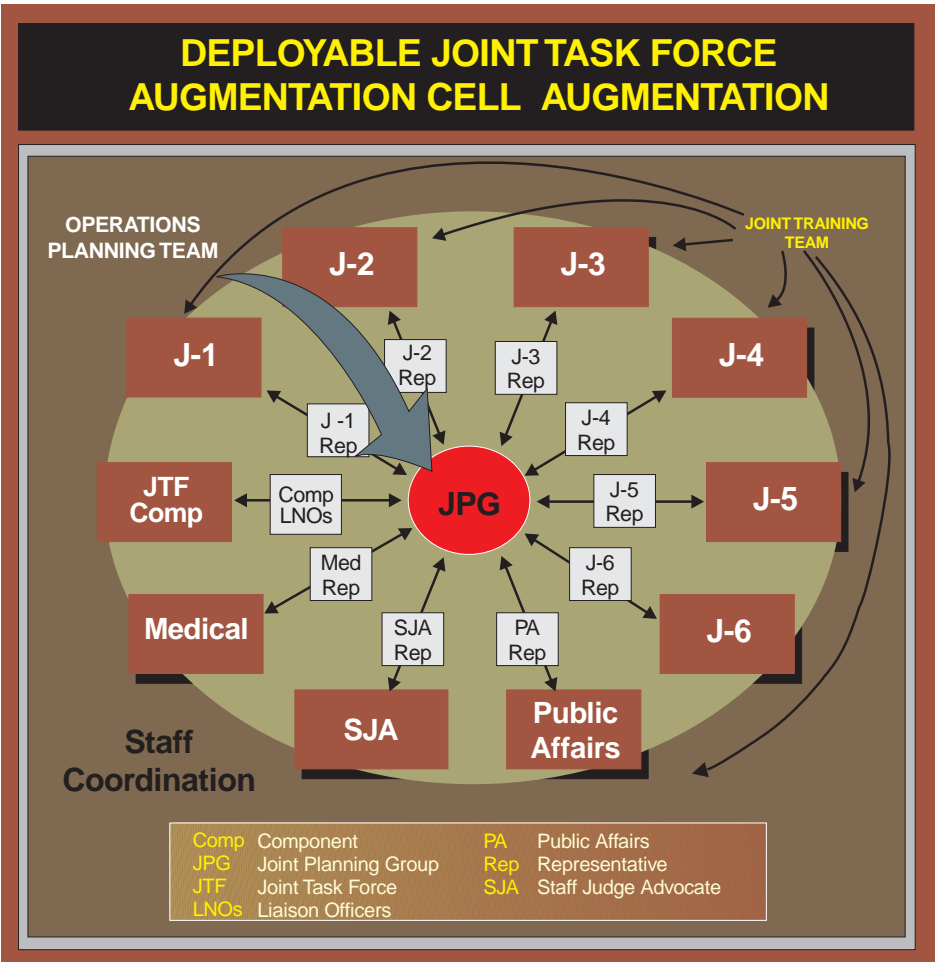


Figure IX-7. Deployable Joint Task Force Augmentation Cell Augmentation

e. Normally, the head of the JPG is an officer in the grade of O-6. For the JPG to be effective, this officer must be experienced in joint planning and operations.

- **The head of the JPG must ensure that this group is organized from the start with a clear, concise agenda.**
 - The dynamics of CAP requires that a daily schedule be developed for the JPG that supports the tasks at hand and the CJTF's requirements.

- Timelines and milestones need to be firmly established to ensure "time spent" equates to "quality output."

- **In establishing these timelines and milestones, consideration must be given not only to the time required for the JTF to accomplish its planning, but also the time required by the JTF components to plan and produce the necessary products required by the CJTF.** (1) Some commands use the "1/3-2/3 rule" as a guide for establishing

JOINT PLANNING GROUP LINKAGES AND MEMBERSHIP

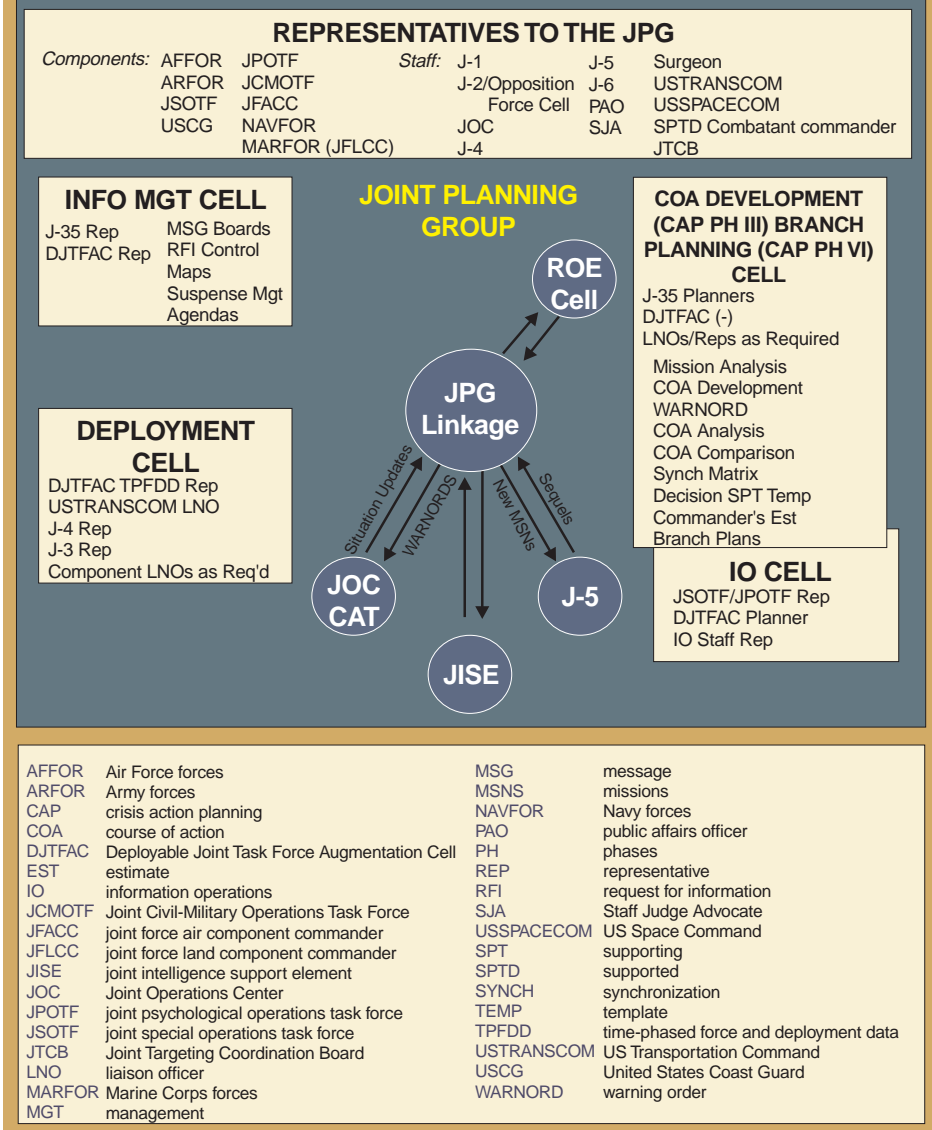


Figure IX-8. Joint Planning Group Linkages and Membership

planning timelines — 1/3 of the time available would be provided to the JTF for planning and 2/3s of the available time would be provided to the JTF components for planning. (2) This rule, if used, only should be looked at as a

starting point. (3) It also is important to consider that at times, the location of **components may be in different time zones** from the CJTF, which may hamper significantly the timely and effective initial JTF planning.

- **The CJTF must determine, based on such factors as mission execution time, direction from the supported combatant commander, and staff experience, when the components are brought “on board” for planning and the necessary time required for both the JTF and components to do their planning.** (1) In some situations, it may be best for the JTF to take the first 2-3 days for its planning and gradually phase in the components for planning. (2) The JPG may be doing much of the planning but it is the responsibility of the **CJTF to establish the planning timeline for the overall effort to include that of the components.**
 - It may be necessary to conduct some training during the initial standup of the JPG. All representatives may not be “up-to-speed” with the complexities of joint planning. The head of the JPG should determine these training requirements through an evaluation process. An organization such as USACOM’s and USPACOM’s DJTFAC and USEUCOM’s core JTF cell could provide the expertise to provide training to these individuals.
 - Another important function for the head of the JPG is to develop a system to ensure that representatives understand their role in this group and to provide a forum for these individuals to voice their concerns, issues, and ability to support a particular COA. Included in this system must be the **capability for proper JTF staff coordination** and how the JTF will communicate with the supported combatant command and other agencies. Below are a number of sample questions that should be of concern to the head of the JPG. (Establishing the policy for internal and external coordination is not the responsibility of the JPG, but how this policy is established will impact on the functioning of the JPG.)
 - Has the JTF established an internal system to coordinate the release of message traffic and the distribution of messages?
 - Who can coordinate with higher authority?
 - What method will be used to communicate with higher authority?
 - **Has the JTF established an internal system to monitor what action has been taken on pending issues?**
 - f. The DCJTF and the chief of staff should be involved in the JPG, providing guidance and insight into the CJTF’s critical concerns. **These individuals should not allow the JPG to get “bogged down” with trivia or headed off on a tangent that does not support the CJTF’s guidance.**
 - g. Effectiveness of the JPG will be measured, in part, by the support provided to it by the principal JTF staff officers (J-1 through J-6). **At times, the principal staff officers should be the representatives to the JPG.**
 - h. Early designation of a JTF will facilitate the forming of the JPG and the commencement of the planning process. It may be possible to form a JPG without the JTF being fully organized and staffed.
 - i. The immediate concern of the JPG is to commence the CAP process. Detailed mission analysis is critical during this process.
- The JPG prepares initial correspondence (e.g., letters of instruction, warning orders, alert orders, planning orders) for distribution to the JTF components or others based on guidance from the CJTF.
 - Formats for various type orders are in Joint Pub 5-03.1 (to be converted to

CJCSM 3122.01), “Joint Operation Planning and Execution System Vol I: (Planning Policies and Procedures).”

- It also is important for the CJTF to provide to JTF components and others only what is needed when preparing messages, orders, or other directives. There is no requirement to duplicate the complete contents of orders from higher authority unless required for emphasis. Much of these contents can be referenced by the JTF in its orders as long as the referenced material is readily available to all that need it — higher authority orders may be retransmitted by the JTF to the commands that require them.

j. As the JPG works through the CAP process towards development of an OPORD, it is important that the head of the JPG devise a system which analyzes COAs. There has to be a synchronization process to ensure that “all parts” of the JTF will work in unison from planning through operations.

k. The head of the JPG normally arranges for briefings to appropriate individuals (e.g., CJTF, supported combatant commander, and others as required) as JPG milestones are reached.

l. The development of the JTF OPORD can be a long and tedious process. JPG can be the focal point for OPORD development. JTF’s OPORD normally will be based on the JTF’s establishing authority’s (supported combatant commander’s) OPORD.

- The JPG must ensure that staff sections and individuals responsible for developing various sections of the OPORD are aware of their responsibilities.
- A sample OPORD is provided in Joint Pub 5-03.1 (to be converted to CJCSM

3122.01), “Joint Operation Planning and Execution System Vol I: (Planning Policies and Procedures).”

- As previously stated, information in the supported OPORD need not be repeated (that can be referenced) in the supporting OPORD unless directed.

- Referenced material should be readily available to all that require it.

- If there is a requirement for annexes and appendices to support the CJTF OPORD, formats in CJCSM 3122.03, “Joint Operation Planning and Execution System Vol II: (Planning Formats and Guidance)”, and CJCSM 3122.04, “Joint Operation Planning and Execution System Vol II: (Planning and Execution Formats and Guidance) (Secret Supplement)” should be used.

m. Upon completion of the OPORD and/or OPLAN and based on CJTF guidance, the JPG focus turns to execution phase planning. Typically, this involves branch and sequel planning. Figure IX-9 represents one organizational strategy for conducting this type of planning.

- The planning for future operations often is accomplished under the cognizance of the J-3 (future operations cell).
- Other functions the JPG may perform are the planning for termination and the planning for transition of the JTF to another military force, UN, regional organization, or civilian organization.
- Again, the JPG Chief must be cognizant of the other responsibilities of JPG representatives. A balance between effective staff and/or component coordination and overloading LNOs with meetings must be maintained.

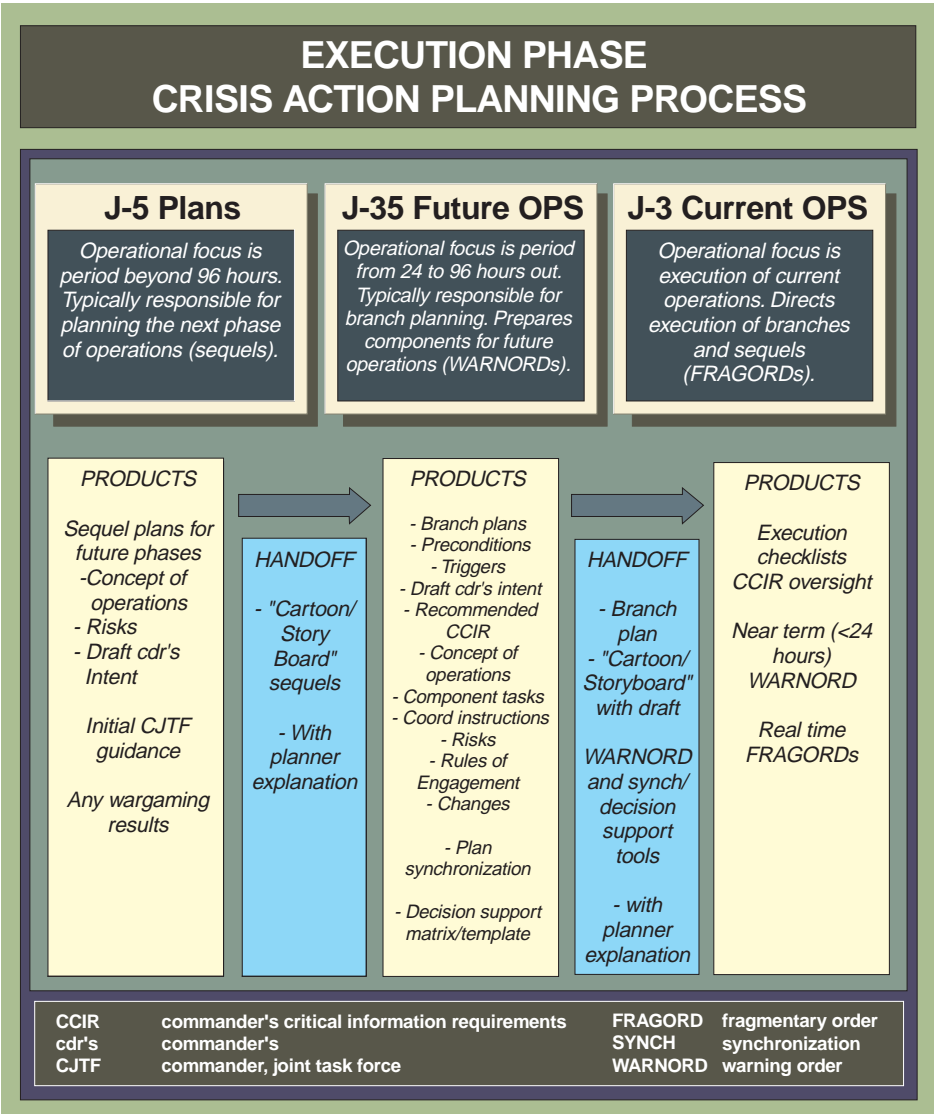


Figure IX-9. Execution Phase Crisis Action Planning Process

n. The value of an organization such as a JPG only can be measured by the coordination, cooperation, and communication among the staff sections. Without these factors, quality products will be difficult to produce.

o. To reiterate a key point, the establishment, functions, and interaction (with the JTF staff) of the JPG must be

clearly articulated by the CJTF to prevent misunderstandings and “intramural disputes.”

7. Crisis Action Planning Process

Figure IX-10 is a graphical depiction of the CAP process.

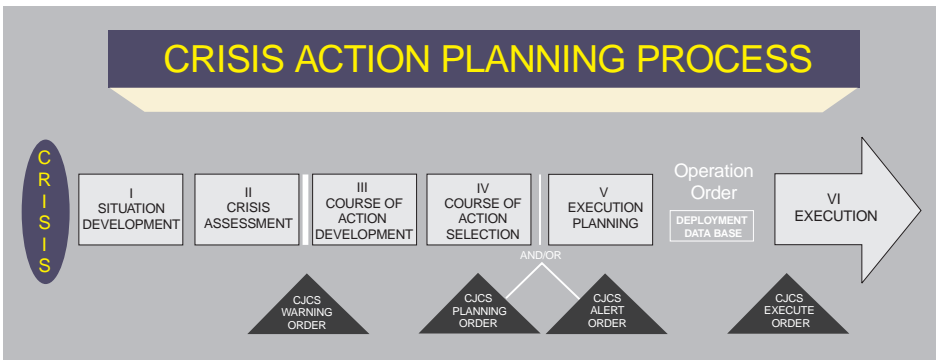


Figure IX-10. Crisis Action Planning Process

a. CAP involves a structured process and provides for the transition from planning of military operations to their execution.

b. This planning is accomplished within a framework of six phases which allows for flexibility and time-sensitive decisions. These

phases may be omitted or compressed in the interest of time criticality. Figure IX-11 summarizes and highlights various aspects of these phases. In Figure IX-11, the term “supported commander” equates to the JTF establishing authority (e.g., supported combatant commander).

PHASES OF CRISIS ACTION PLANNING

Phase I — SITUATION DEVELOPMENT

- Potential problem detected, reported, and assessed.
- Focus of CAP is on the combatant commander in whose area the event occurs.
- Combatant commander prepares an assessment of the event and submits it to the National Command Authorities (NCA) and the Chairman of the Joint Chiefs of Staff (CJCS).
- Course of action (COA) also may be submitted depending on the time sensitivity of the situation.
- If established, the joint task force (JTF) **would monitor the situation and make preparatory plans to commence CAP** — may involve more interaction depending on the supported commander’s guidance.

Figure IX-11. Phases of Crisis Action Planning

CRISIS ACTION PLANNING PHASE I



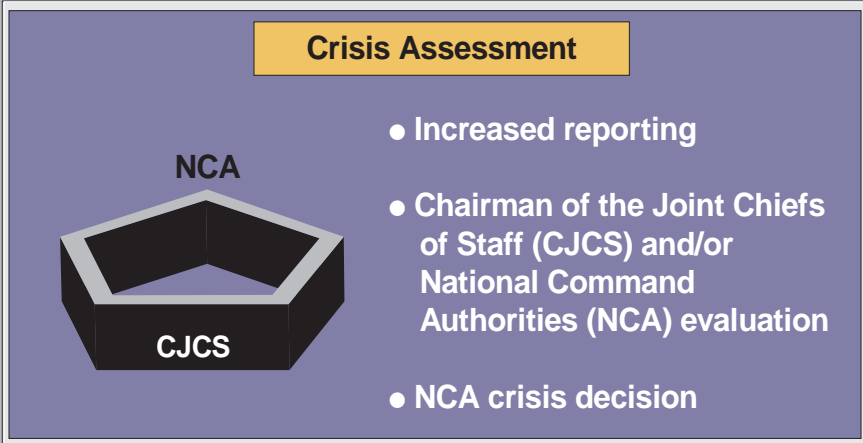
Phase II — CRISIS ASSESSMENT

- NCA, CJCS, and other members of the Joint Chiefs of Staff (JCS) analyze the situation to determine whether a military option should be prepared.
- NCA makes a decision concerning progressing to the next phase, remaining in current phase, or returning to the pre-crisis situation.
- Specific guidance on COA development may be provided by the NCA.
- Supported commander would continue to monitor situation and conduct planning as required, including providing necessary information to JTF.

Figure IX-11. Phases of Crisis Action Planning (cont'd)

- The JTF, if established, would continue to monitor the situation and review any existing documentation (plans and area studies) pertaining to the area in question.
- The JTF may conduct informal discussions with potential components and retransmit message traffic or other pertinent information.

CRISIS ACTION PLANNING PHASE II



Phase III — COURSE OF ACTION DEVELOPMENT

- Implements NCA decision or CJCS planning directive to develop military options.
- The Chairman of the Joint Chiefs of Staff probably would transmit a warning order to the supported commander to commence preparation of COAs. Other type directives could be issued by the Chairman depending on the time sensitivity of the situation.
- **The directive establishes command relationships, identifies the mission, and provides any planning constraints.** In addition, this directive will either identify forces and strategic mobility resources and establish tentative timing for execution, or request the supported commander to develop these factors.
- In the event the NCA directs development of a specific COA, the directive will describe the COA and request the supported commander's assessment.

Figure IX-11. Phases of Crisis Action Planning (cont'd)

- Upon receipt of the CJCS directive (warning order), the supported commander develops and analyzes COAs.
- Based on the CJCS directive, the supported commander would transmit a directive, perhaps a warning order, to the JTF and other commands as appropriate to provide necessary guidance and information.
- Force requirements established and timed-phased force and deployment data (TPFDD) development commences for each COA (time permitting).
- The United States Transportation Command (USTRANSCOM) reviews the proposed COAs and prepares deployment estimates. When possible, **USTRANSCOM or its representative should participate in the development of COAs.**
- Services monitor development of COAs and begin planning for support forces, sustainment, and mobilization.
- **If not previously established, the JTF would be established and commence the CAP process.**
- Guidance from the supported commander should prescribe the extent of the JTF involvement in CAP (e.g., JTF components have been identified and activated for planning, mission analysis, COA development, and TPFDD development).
- **The commander, joint task force (CJTF) prepares and issues a directive to JTF components concerning current situation.** This directive may be in the form of a warning order. It does not have to reiterate (unless directed) the complete contents of the directives from higher authority or include every section of a warning order, but should **provide to the JTF components what is needed.**
- **The CJTF should be evaluating requirements (forces and equipment) for the JTF and discussing these issues with the supported commander.**
- The supported commander analyzes the COAs and submits recommendations to the NCA and the Chairman of the Joint Chiefs of Staff as the supported commander's estimate. The COA development phase of CAP ends with the submission of the supported commander's estimate.

Figure IX-11. Phases of Crisis Action Planning (cont'd)

CRISIS ACTION PLANNING PHASE III

Course of Action (COA) Development

Chairman of the
Joint Chiefs of Staff
Warning Order

- Joint task force establishment
- COAs developed and evaluated
- Joint Operation Planning and Execution System data base established

Commander's
Estimate

Phase IV — COURSE OF ACTION SELECTION

- Selection of a COA by the NCA and initiation of execution planning.
- The Chairman of the Joint Chiefs of Staff and the other members of the JCS review and evaluate the COAs and prepare recommendations and advice for consideration by the NCA.
- **Upon receipt of the NCA decision, the Chairman of the Joint Chiefs of Staff issues an alert order.** This order is approved by the Secretary of Defense and issued to the supported commander and other members of the Joint Planning and Execution Community to announce the COA selected by the NCA and to initiate execution planning.

Figure IX-11. Phases of Crisis Action Planning (cont'd)

- A CJCS alert order provides sufficient detail to allow the supported combatant commander to conduct detailed planning required to deploy forces. Additionally, this order contains direction to amplify or change earlier guidance provided in the CJCS warning order.
- A CJCS planning order (vice alert order) may be issued to initiate execution planning prior to selection of a COA by the NCA. The planning order normally is not used to direct the deployment of forces or to increase force readiness. If force deployment is directed, the planning order will require the approval of the Secretary of Defense.
- The supported commander issues a directive (e.g., alert or planning order) to the CJTF to commence detailed execution planning. Additional information would be provided, as appropriate.
- **The CJTF commences more detailed execution planning.** Determination of JTF force requirements continues as well as overall JTF organization.
- **The CJTF issues a directive (e.g., alert or planning order) to the JTF components to commence execution planning.** As previously stated, the CJTF does not need to repeat all that is stated in the directives from higher authority; again, provide what is needed to the JTF components. It also would be prudent for the CJTF to retransmit appropriate directives from higher authority to the JTF components.

CRISIS ACTION PLANNING PHASE IV

Course of Action (COA) Selection

- **Chairman of the Joint Chiefs of Staff presents refined and/or prioritized COAs to the National Command Authorities (NCA)**
- **NCA select COA**

**Chairman of the
Joint Chiefs of
Staff Alert or
Planning Order**

Figure IX-11. Phases of Crisis Action Planning (cont'd)

Phase V — EXECUTION PLANNING

- **Execution planning commences when the alert or planning order is issued.**
- The NCA-approved COA is transformed into an operation order (OPORD) by the supported commander.
- Actual forces, sustainment, and strategic mobility resources are identified and the concept of operations is described in OPORD format.
- **The CJTF develops an OPORD based on the supported commander's OPORD** — Joint Operation Planning and Execution System (JOPES) procedures are used to develop the OPORD and TPFDD.
- **The CJTF develops unsourced force requirements**, enters them into the appropriate TPFDD, and validates the requirements to the supported combatant commander. As directed by the supported combatant commander, supporting commanders, component commanders, and providing organizations source the force requirements and validate the sourcing and accurate cargo and personnel detail to the supported combatant commander. The CJTF monitors the sourcing process and validates to the supported combatant commander that the sourced requirements satisfy JTF operational needs. **JTF components must be familiar with TPFDD preparation.** Provision should be made for CJTF input to the Global Command and Control System and the JOPES data base.
- **The supported combatant commander validates the TPFDD to the Commander in Chief, United States Transportation Command (USCINCTrans) — all changes to the validated TPFDD by the CJTF and/or sourcing commanders and organizations must be coordinated through the supported combatant commander, who revalidates the TPFDD prior to any action by USCINCTrans.**
- USTRANSCOM develops transportation schedules.
- **The CJTF issues OPORD to JTF components.**
- **Execution planning phase ends with the NCA decision to implement the OPORD.**

Figure IX-11. Phases of Crisis Action Planning (cont'd)

CRISIS ACTION PLANNING PHASE V

Execution Planning

- **Combatant commander and/or commander, joint task force operation order developed**
- **Time-phased force and deployment data refined**
- **Force preparation**

Phase VI — EXECUTION

- **Execution phase commences when the NCA determines to execute a military option in response to the crisis.**
- **When authorized by the Secretary of Defense, the CJCS issues an execute order. This order is issued to the supported commander and directs the deployment and employment of forces, defines the timing for the initiation of operations, and conveys guidance not provided in earlier orders and directives.**
- **The supported commander issues an execute order to the CJTF that directs the execution of the JTF OPORD.**
- **The CJTF issues an execute order to the JTF components and other commands as necessary.** As with other directives, the CJTF should provide in the execute order only that information required by the JTF components. Retransmission of higher authority directives to the JTF components would be appropriate.
- **This phase continues until the crisis is terminated or the mission is terminated and force redeployment has been completed.**

Figure IX-11. Phases of Crisis Action Planning (cont'd)

CRISIS ACTION PLANNING PHASE VI

Execution

**Chairman of the Joint
Chiefs of Staff
Execute Order**

**Combatant
Commander
Execute Order**

- **Combatant commander and/or joint task force execute operation order**
- **Begin redeployment planning**
- **Crisis resolved and/or redeploy forces**

Figure IX-11. Phases of Crisis Action Planning (cont'd)

c. CJCSM 3122.01, “Joint Operation Planning and Execution System Vol I: (Planning Policies and Procedures),” which will replace Joint Pub 5-03.1, CJCSM 3122.03, “Joint Operation Planning and Execution System Vol II: (Planning Formats and Guidance),” CJCSM 3122.04, “Joint Operation Planning and Execution System Vol II: (Planning and Execution Formats and Guidance) (Secret Supplement),” and Joint Pub 1-03, “Joint Reporting Structure (JRS) General Instructions,” (to be converted to CJCSM 3150.01) provide sample formats for various directives, OPLANs, OPORDs,

CONPLANs, functional plans, and operational reporting formats.

d. CAP documents are shown in Figure IX-12. A sample OPORD format is shown in Figure IX-13.

e. During CAP, the CJTF would be involved with many other functions in addition to those listed in Figure IX-3. **One of the most important CJTF functions is to provide planning guidance (this should include the friendly centers of gravity) to the JTF staff to allow it to develop staff estimates, properly analyze each COA, and create the concept of operations.**

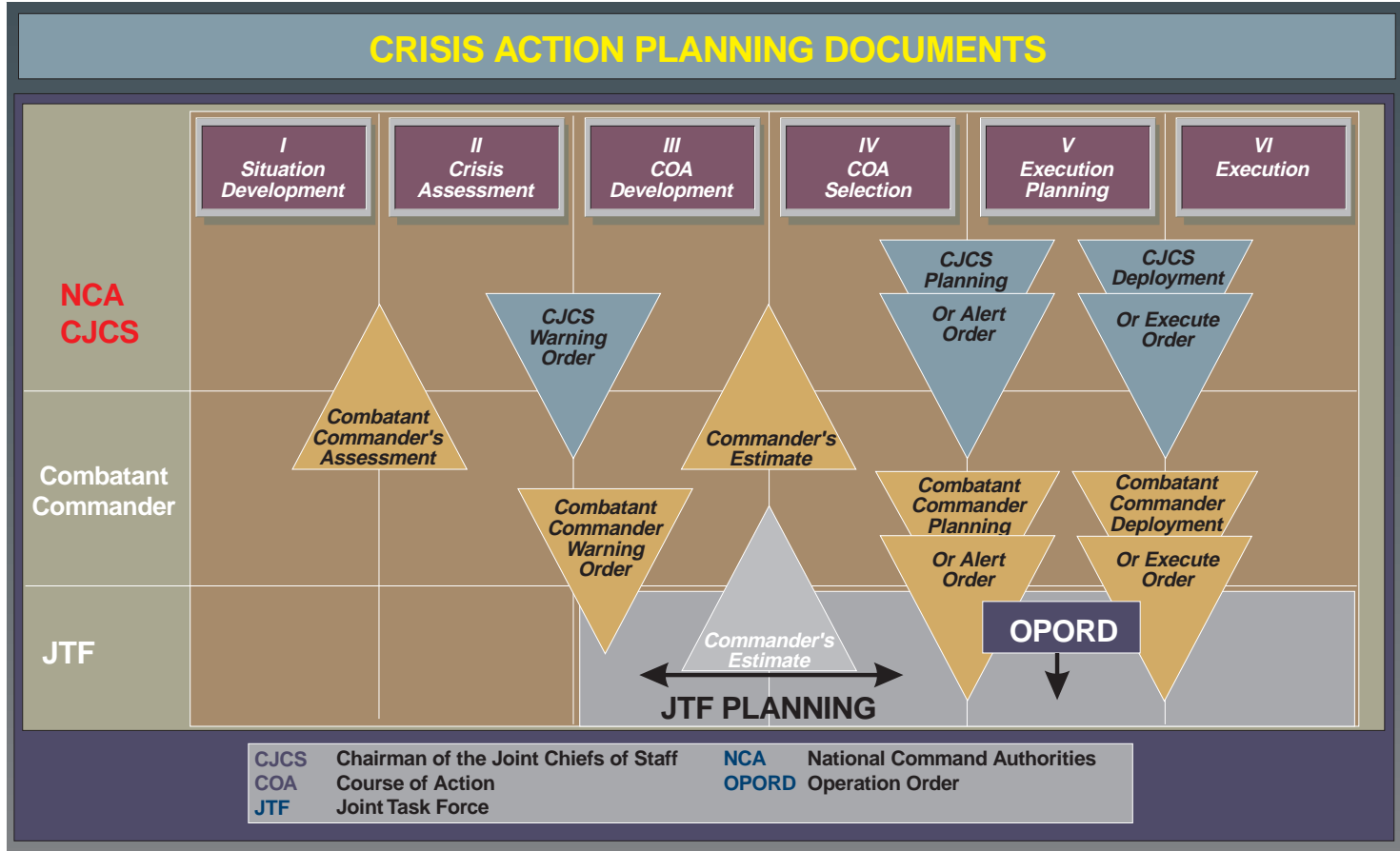


Figure IX-12. Crisis Action Planning Documents